

# *Planning To Grow in 2015*

## *What Does It Take?*



# Rules of the Road

The “Vegas Rule”

Confidentiality

The “Airplane Rule”

Cells off for the flight

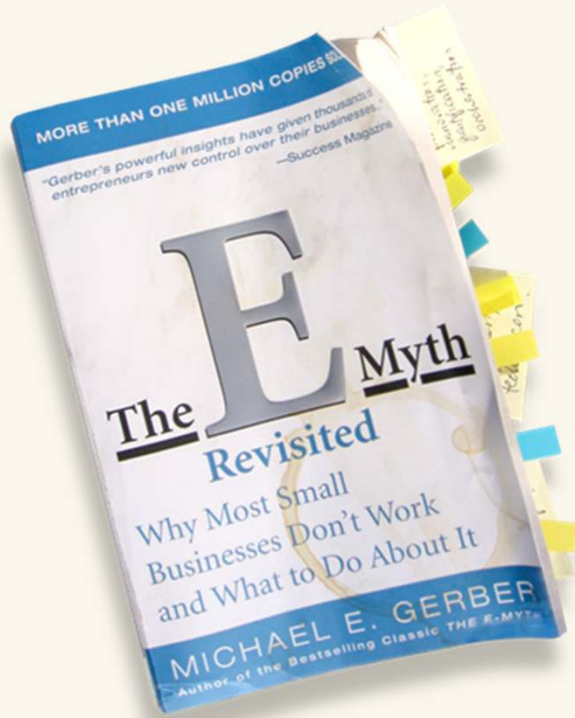
# What is Keeping You From Growth?



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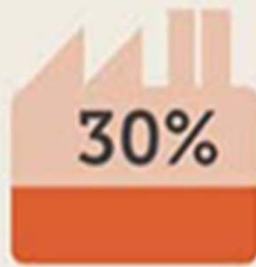
# My 'Anti-Growth' Story



- ▶ Company With No Plan
- ▶ Light Bulb Turned On!
- ▶ Took Over the Company
- ▶ Came Home to Montana

# Does It Really Matter?

**Businesses with a written description of their future had:**



Greater  
Company  
Size



More Owner  
Compensation



Faster  
Growth

# Agenda

**❑ What Frustrates Growth?**

**BREAK**

**❑ Planning For Growth**

# The Entrepreneurial Seizure





# The 'E'ntrepreneurial Myth



- ▶ Carpenters Start Contracting Businesses
- ▶ CPAs Open Accounting Firms
- ▶ Dancers Open Dance Studios



# The Fatal Assumption

I know how to do the work =

I know how to run a business to do the work.

***FALSE***

# Strategic vs. Tactical Work

Strategic Work

Tactical Work



*Defining the Results*

*Producing the Results*

Executives

Managers

Technicians

# Not Doing Your OWN Job

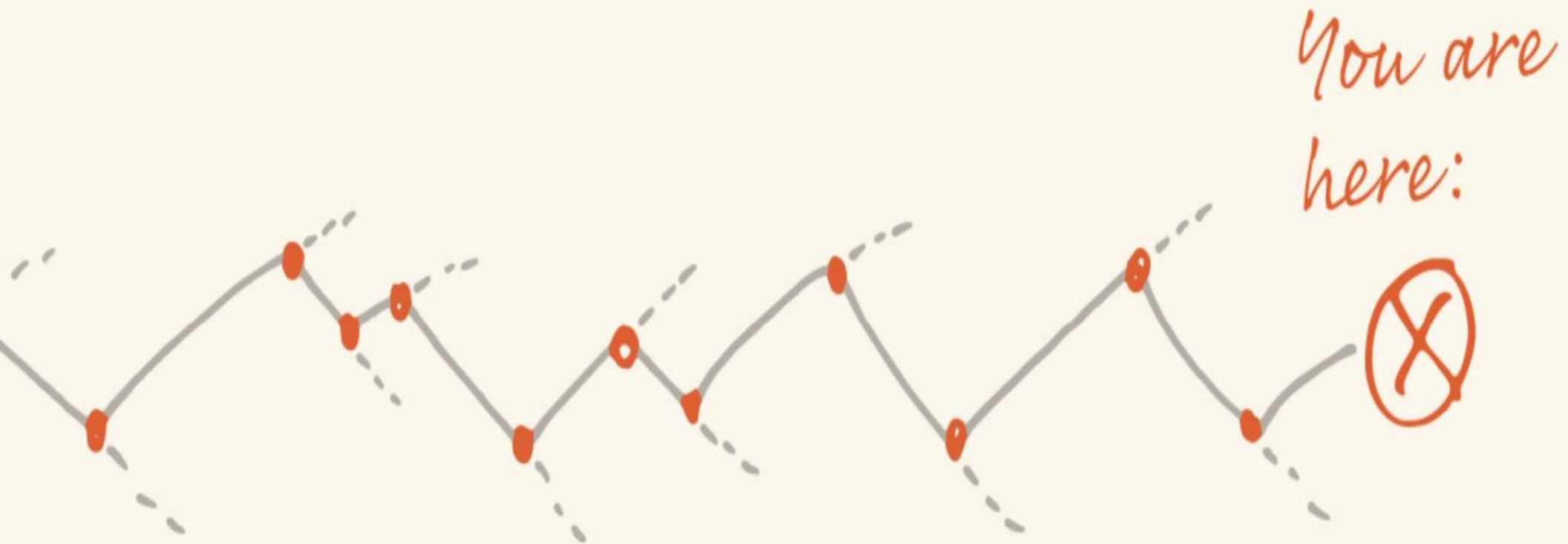
Roles	Entrepreneurial Work	Managerial Work	Technical Work
CEO	75%	20%	5%
Senior Managers	20%	70%	10%
Managers	5%	75%	20%
Front line Employees	5%	5%	90%

The Problem *Might* Be

YOU

(Actually, It Is You)

# You Are Where YOU Chose To Be



# Ownership $\neq$ Leadership



**Responsibility**

Being a Leader Means  
Owning ***Everything*** –  
Including Your  
***Lack of Growth***

# Leadership Questions

- ✓ Are You Willing to Be REAL About Your Business?
- ✓ Are You Ready to Take FULL Ownership?
- ✓ How Have YOU Slowed Down Your Own Growth?



# Find A Partner and Introduce Yourself

**☐ Your Name**

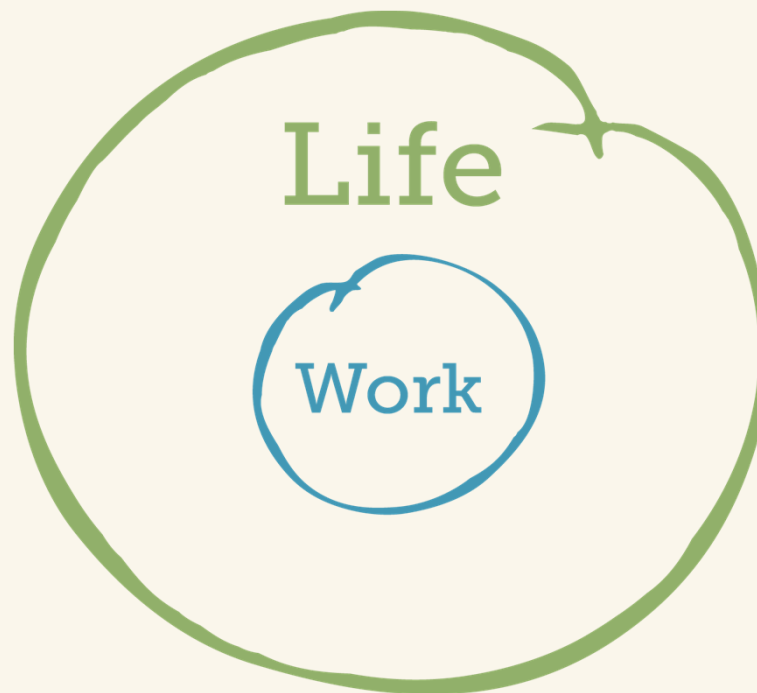
**☐ Role You Play At Your Company**

**☐ Name One Way You Have Slowed Your Own Growth?**

- ▶ No Vision
- ▶ Too Much Technician
- ▶ Not Accepting Responsibility

# Now For The Good News

## Your Life *CAN* Run Your Business



A person is walking barefoot on a sandy beach at sunset. The person is wearing light-colored, loose-fitting pants that are rolled up at the ankles. The sun is low on the horizon, creating a warm, golden glow across the sky and the wet sand. The ocean waves are visible in the background, and the overall atmosphere is peaceful and serene.

Your Business Can  
**Serve**  
Your Life

# Business Model for Growth



# Agenda

❑ **What Frustrates Growth?**

**BREAK**

❑ **Planning For Growth**

# Business Model for Growth



# *The 7 Dynamics*



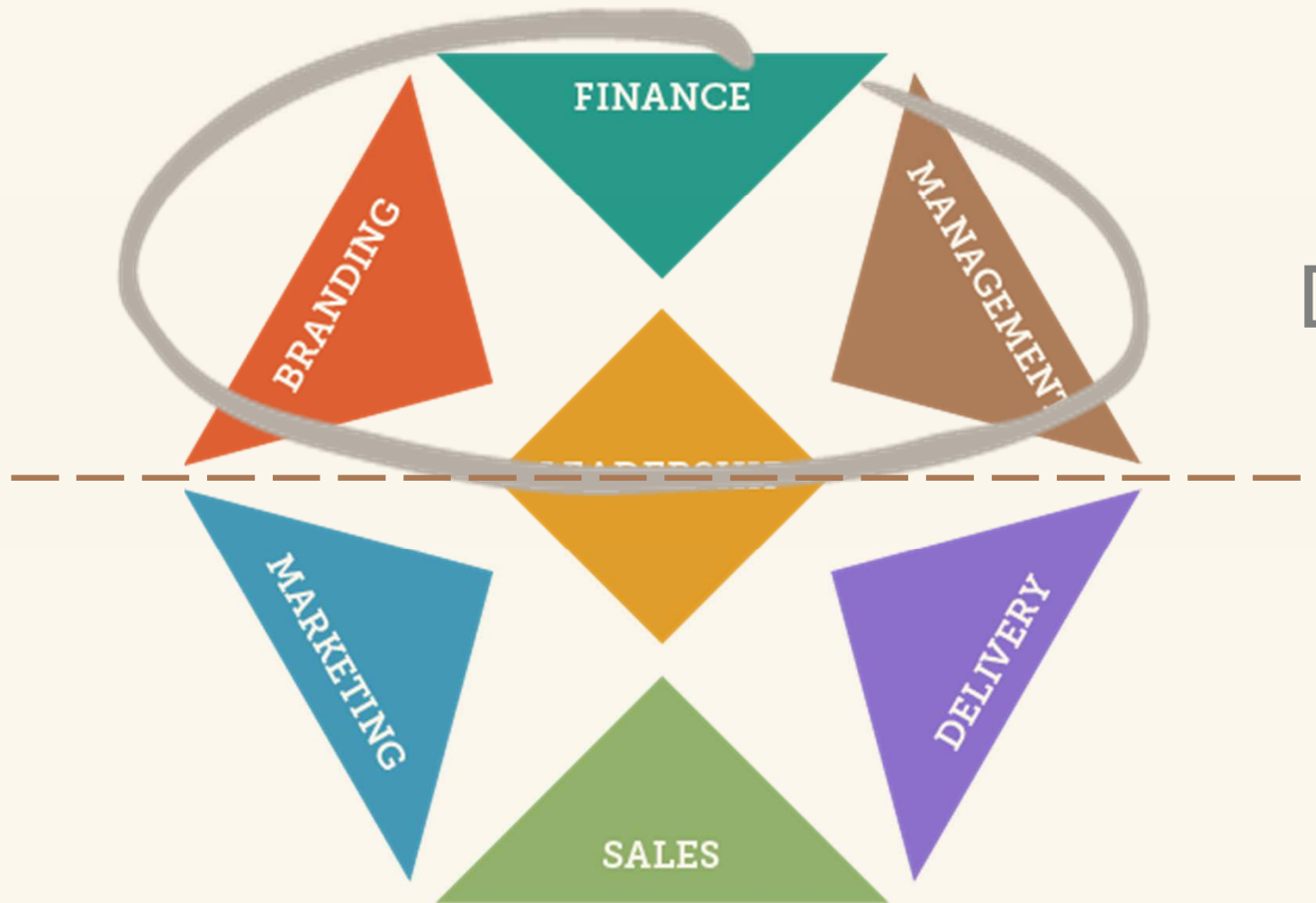


# Leadership is at the Center



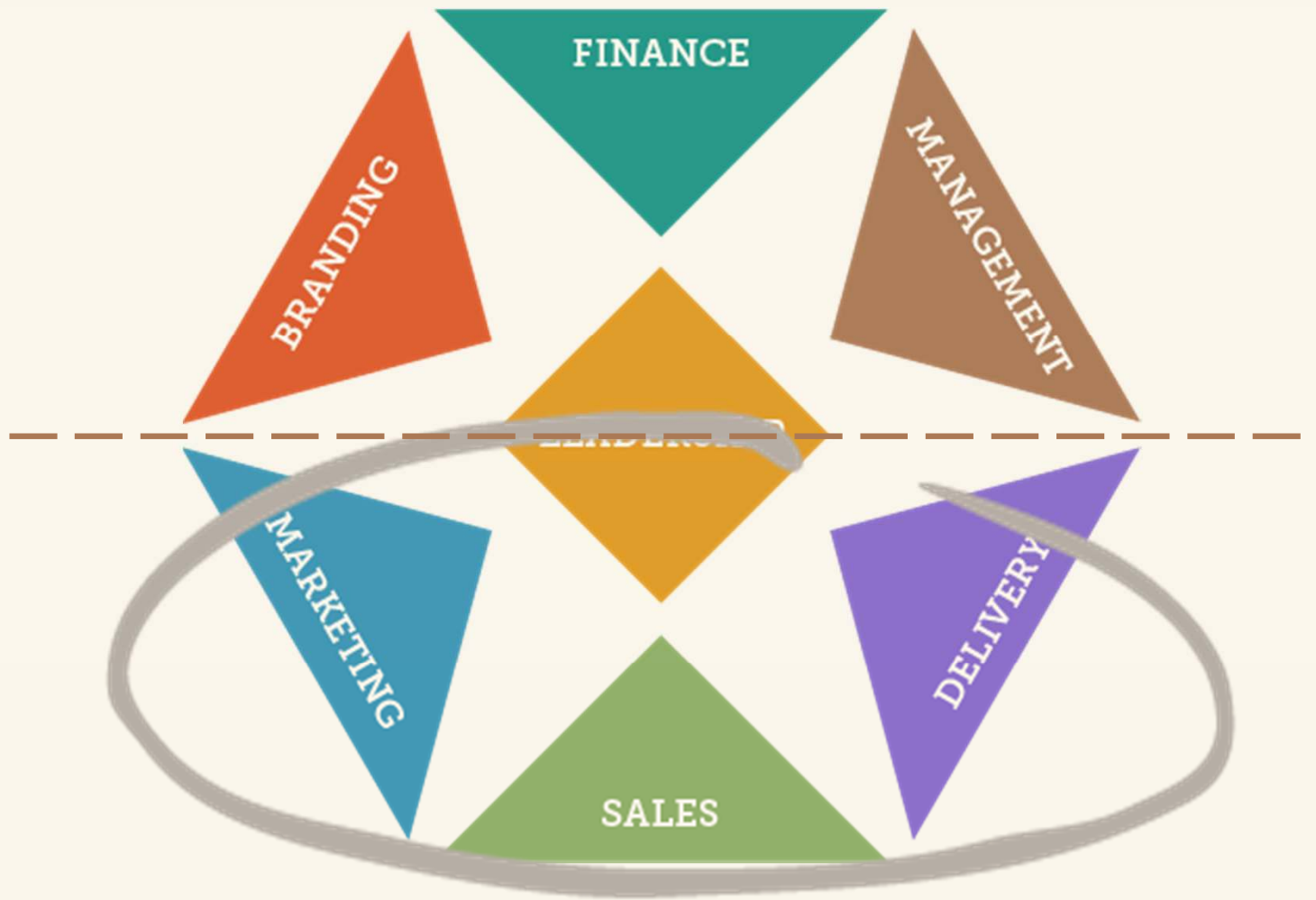
Your Vision

# Branding...Finance...Management



The  
Disciplines

# Marketing...Sales...Delivery



The  
Activities

# Exercise:

## Build a Plan for Growth

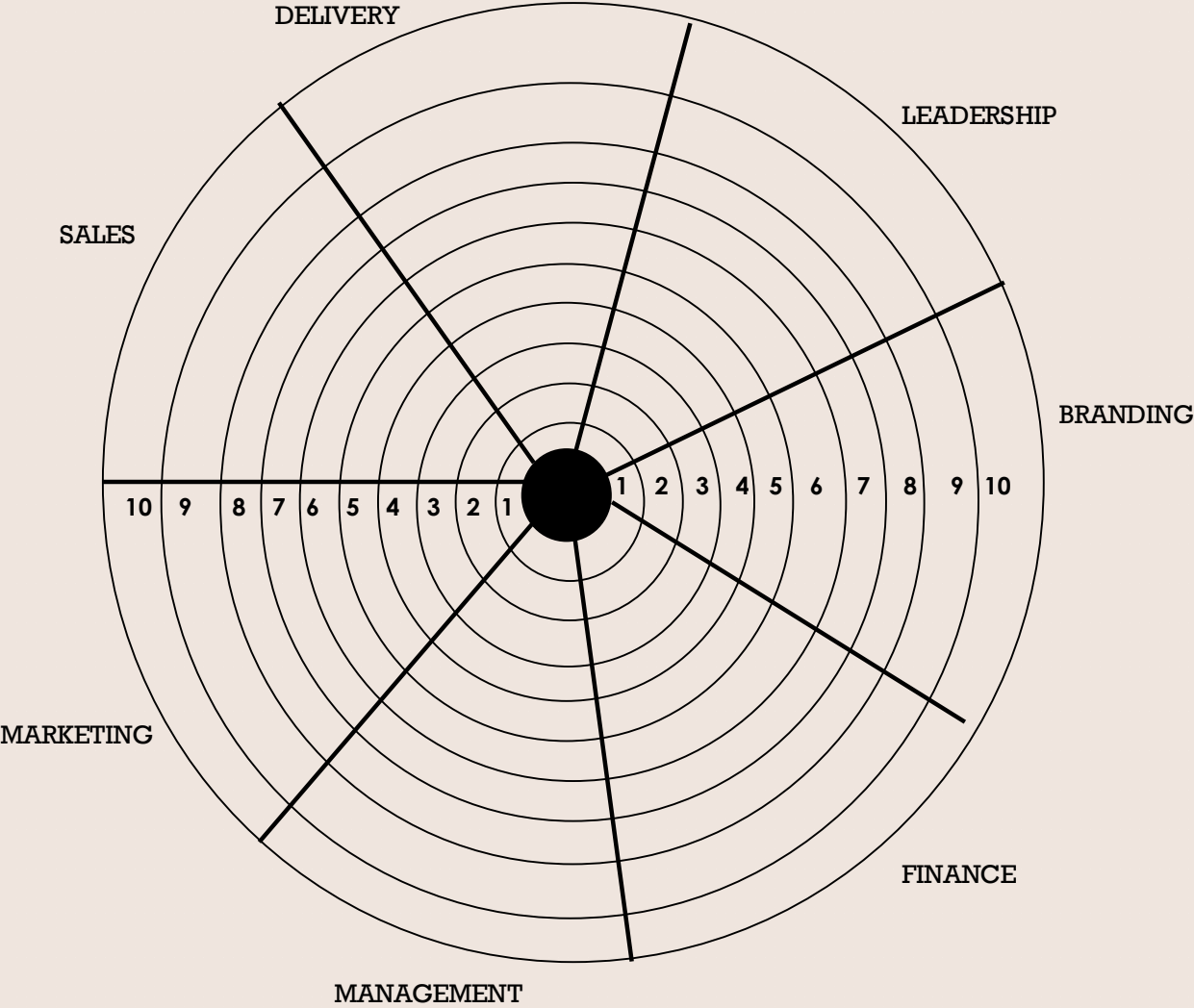
For each of the seven dynamics:

1. Read the associated questions.
2. Rate your current state on a scale of 1-10.
3. Name 1 thing that will get it closer to being a 10.

Business Growth Plan:  
Rate Yourself in Each Area



Level 10



Leadership: \_\_\_\_\_

Management: \_\_\_\_\_

Branding: \_\_\_\_\_

Finance: \_\_\_\_\_

Sales/Marketing: \_\_\_\_\_

Delivery: \_\_\_\_\_

On a scale of 1-10, how would you rate  
your current LEADERSHIP abilities?

Do you have a written Vision for the next 3 years of your business? 1-3 points

Do your employees understand your Vision and how to get there? 1-3 points

Is your life running your business (or your business running your life)? 1-4 points

Choose One (Doable) Action Item to get you closer to being a 10?

On a scale of 1-10, how would you rate  
your BRAND (i.e. your promise to your customer)?

Can you describe your unique BRAND promise in one sentence? 1-3 points

Do your employees understand your BRAND and do they BELIEVE it? 1-3 points

Is your BRAND seen in every aspect of your business? 1-4 points

Choose One (Doable) Action Item to get you closer to being a 10?



On a scale of 1-10, how would you rate  
your FINANCIAL health of your business?

Do you know how to read and interpret your INCOME STATEMENT? 1-3 points

Do you ever have CASH FLOW problems? 1-3 points

Do you have a BUDGET and do you use it to make decisions? 1-4 points

Choose One (Doable) Action Item to get you closer to being a 10?

On a scale of 1-10, how would you rate  
your MANAGEMENT ability?

Do you have written POSITION AGREEMENTS for all of your staff? 1-3 points

How long would your business run well if you were ABSENT? 1-3 points

Are you confident that you have the BEST person in each position? 1-4 points

Choose One (Doable) Action Item to get you closer to being a 10?

On a scale of 1-10, how would you rate  
your MARKETING & SALES activities?

Do you have an effective LEAD GENERATION process? 1-3 points

Have you created a profile for your IDEAL CUSTOMER? 1-3 points

Do your salespeople have an effective, consistent SALES PROCESS? 1-4 points

Choose One (Doable) Action Item to get you closer to being a 10?

On a scale of 1-10, how would you rate  
the DELIVERY of your Product/Service?

Do you always DELIVER ON YOUR PROMISES to your customer? 1-3 points

Do you get regular FEEDBACK from your customers? 1-3 points

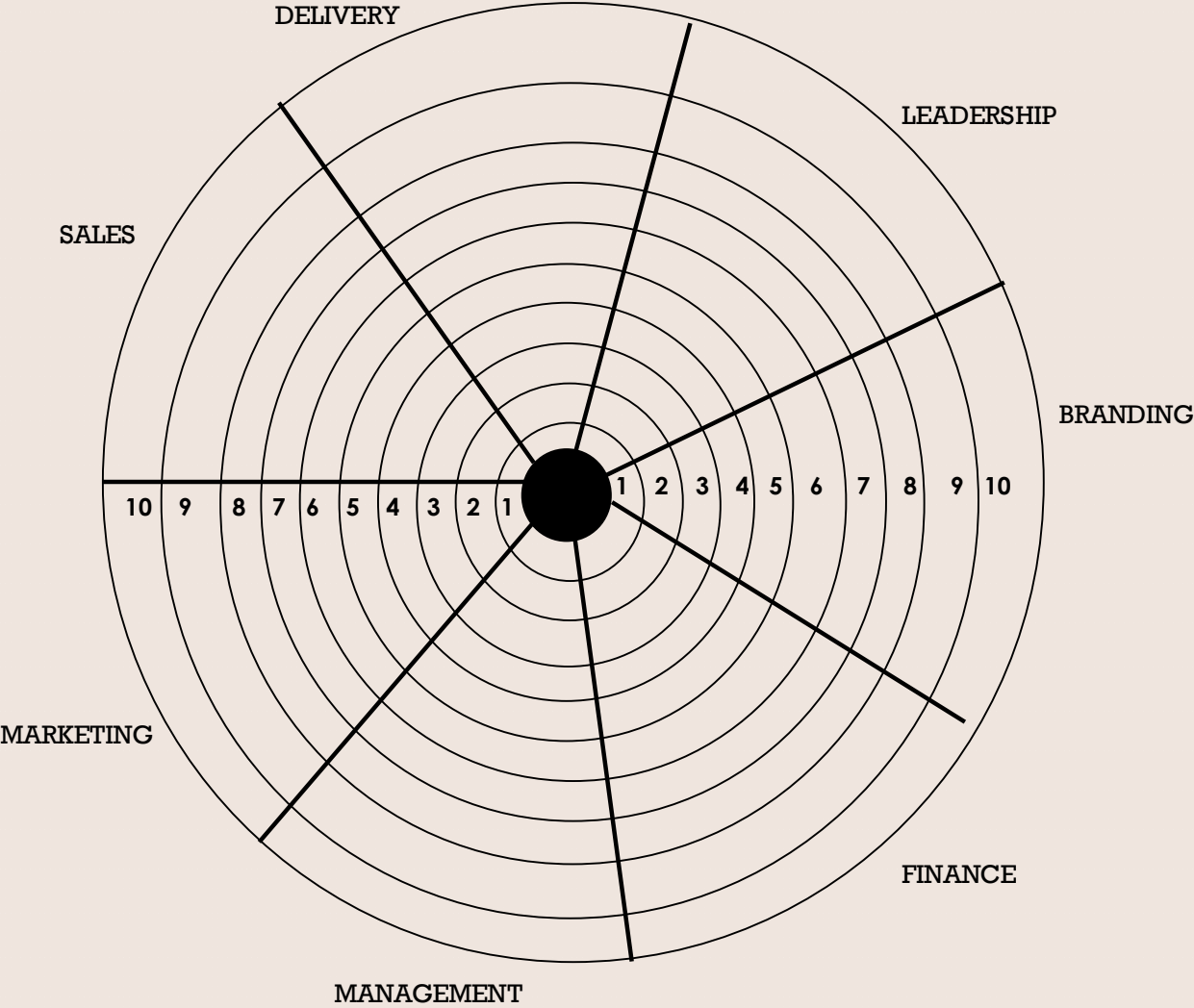
Do you have a clear, written strategy for INNOVATION? 1-4 points

Choose One (Doable) Action Item to get you closer to being a 10?

Business Growth Plan:  
Rate Yourself in Each Area



Level 10



Leadership: \_\_\_\_\_

Management: \_\_\_\_\_

Branding: \_\_\_\_\_

Finance: \_\_\_\_\_

Sales/Marketing: \_\_\_\_\_

Delivery: \_\_\_\_\_

## *Final Steps*

- ▶ Step 1 - Take Ownership
- ▶ Step 2 - Get Accountability
- ▶ Step 3 - Pick 1 Task a Month



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